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EU-25

Food Processing Ingredients Sector

The EU's Food and Drink Industry

2005

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Report Highlights:
The food and drink sector is of major importance in economic terms and plays an important role in consumer protection issues. Due to the economic slowdown and the strength of the Euro against the US dollar, the food and drink industry in the EU-25 registered a growth of only 1.9 percent in its turnover in 2003 compared to 2002 and exports of food and drink products decreased slightly.

Includes PSD Changes: No
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THE EU'S FOOD & DRINK INDUSTRY

INTRO

The food and drink (F&D) industry is the sector that processes and packages products for human and animal consumption. It is of major importance in economic terms and plays an important role in consumer protection issues. The processing of agricultural products is subject to very strict EU food safety, quality and labeling rules. Given its tight link with the agricultural sector, the EU's F&D industry is deeply affected by the developments in the common agricultural policy (CAP). Because of the CAP, agricultural prices on EU markets are higher than on world markets, resulting in higher input prices for the F&D industry. However, the EU pays export subsidies to European F&D enterprises to increase their competitiveness on world markets. The F&D industry buys and adds value to 70% of all EU agricultural produce.

Due to the economic slowdown and the strength of the Euro against the U.S. dollar, the F&D industry in the EU-25 registered a growth of only 1.9% in its turnover in 2003 compared to 2002 and exports of food and drink products decreased slightly.

EU DEMOGRAPHY

The enlargement of the EU with 10 new member states has increased the EU population by 20% to 457 million inhabitants but only increased its GDP by 4.5%. With enlargement, the percentage of the world's 6.3 billion inhabitants living in the EU has risen from 6.1% to 7.2%, making the EU the third most-populated political entity (behind China and India) and 55% larger than the U.S. Nearly three-quarters of the EU's population live in 6 of the 25 member states (Germany, U.K, France, Italy, Poland and Spain) while the remaining quarter are distributed among 19 member states with small to very small populations. Differences in the social situation between the majority of the EU-15 and the new member states are large in several areas.

The EU is facing unprecedented demographic changes that will have a major impact on society and the economy. People are living longer and in better health. Fertility rates have dropped to 1.5 children per woman and by 2030, Europe will have 18 million fewer children and young people than today. In 2030, the number of "older workers" (aged 55 to 64) will have risen by 24 million and the EU will have 34.7 million citizens aged over 80 (compared to 18.8 million today). Enlargement will not change the EU's ageing process. The potential for economic growth and social improvement will continue to be affected by a contracting active population and an expanding population in retirement.

Eurostat base scenario, EU-25 (in thousands)				
	2005-2050	2005-2010	2010-2030	2030-2050
Total Population	-2.1% (-9642)	+1.2% (+5444)	+1.1% (+4980)	-4.3% (-20066)
Children (0-14)	-19.4% (-14415)	-3.2% (-2391)	-8.9% (-6411)	-8.6% (-5612)
Young people (15-24)	-25.0% (-14441)	-4.3% (-2488)	-12.3% (-6815)	-10.6% (-5139)
Young adults (25-39)	-25.8%(-25683)	-4.1% (-4037)	-16.0% (-15271)	-8.0% (-6375)
Adults (40-54)	-19.5% (+19125)	+4.2% (+4170)	-10.0% (+10267)	-14.1% (-13027)

Older workers (55-64)	+8.7% (+4538)	+9.6% (+5024)	+15.5% (+8832)	-14.1% (+9318)
Elderly people (65-79)	+44.1% (+25458)	+3.4% (+1938)	+37.4% (+22301)	+1.5% (+1219)
Very elderly people (80+)	+180.5% (+34026)	+17.1% (+3229)	+57.1% (+12610)	+52.4% (18187)

Source: Eurostat

STRUCTURE & EMPLOYMENT OF THE F&D INDUSTRY

Accounting for 13.6% of the total EU-15 manufacturing sector in 2002, the EU's food and drink (F&D) industry is still the largest manufacturing sector in the EU. As the demand for food products is relatively static, the F&D sector's activity is less cyclic and more constant than manufacturing in general. The F&D sector is less affected by economic fluctuations than other sectors but also shows more modest growth.

EU FOOD AND DRINK SECTOR: STRUCTURE / PRODUCTION BY COUNTRY 2002 & 2003 ESTIMATES				
	Production (Current Prices - Billion Euros)		Employees (x 1000)	
	2002	2003	2002	2003
Belgium	29.9	30.4	87.6	N/A
Denmark	17.7	18.3	78.7	76.3
Germany	125.2	127.9	530.8	525.3
Greece	9.4	N/A	66	N/A
Spain	58.9	62.1	376	381
France	134	136	420	421
Ireland	15	N/A	47	N/A
Italy	100	103	276	274
Netherlands	39	39	135.4	N/A
Austria	11	N/A	79	N/A
Portugal	10.9	N/A	99.3	N/A
Sweden	14.9	15.2	60.7	60.3
Finland	8.7	8.8	38.5	37.1
U.K.	108	N/A	491	N/A
NEW MEMBER STATES				
Czech Republic	8	7.8	144.7	135
Estonia	0.7	0.7	20.2	21.5
Hungary	7.8	8.9	121.4	118.1
Latvia	1	1	33.4	32.1
Lithuania	1.3	N/A	N/A	N/A
Poland	27.2	24.9	473	471.2
Slovakia	2	N/A	N/A	N/A
Slovenia	1.9	1.9	19.5	18.6

Source: CIAA

The turnover of the F&D industry in the EU-25 amounted to EUR 799 billion in 2003. It registered a slow growth of its turnover in current prices estimated at 1.9% in 2003 compared to 2002. Reflecting their demographic weight, France, Germany, U.K., Italy and Spain are the leading producers in the EU. Together, they represent around 65% of total EU turnover and 50% of the employment.

The F&D sector is a relatively fragmented one. A few multinationals compete on the global market with global brands and a large range of products while smaller enterprises serve local markets and concentrate on regional preferences. In the EU, the F&D industry is a major employer with 4.1 million employees of which 61% are employed in small and medium sized enterprises. In 2001, 99% of the companies in the F&D sector were small and medium sized enterprises with less than 250 employees.

Value Added & Employment by Size of Enterprise in the EU - 2001		
	EU-15	**EU-25**
Value Added (%)		
Companies with 1 to 49 employees	24.4	23.9
Companies with 50 to 249 employees	22.3	23.3
Companies with 250 or more	53.3	52.8
Number of persons employed by size of enterprise (%)		
Companies with 1 to 49 employees	38.8	37.0
Companies with 50 to 249 employees	22.3	24.3
Companies with 250 or more	38.9	38.7
Apparent labor productivity (EUR 1,000/person employed)		
Companies with 1 to 49 employees	28.8	25.8
Companies with 50 to 249 employees	45.9	38.4
Companies with 250 or more	62.8	54.6

Source: Eurostat

The F&D manufacturing sector has somewhat atypical characteristics with regard to labor. Although the food sector is like most sectors dominated by males, women filled more jobs than in other manufacturing sectors and there was a greater recourse to part-time work. According to a 2002 labor force survey, 38.5% of F&D employees in the EU-15 were women which was more than 10 percentage points above the corresponding average for manufacturing as a whole.

The average value added generated by each person employed reached EUR 47,000 in the EU-15 in 2001, below the manufacturing average of EUR 51,200. However, average personnel costs were also lower than the manufacturing average at EUR 28,700 in the EU-15 (EUR 24,200 in the EU-25) against EUR 35,700 for the whole of manufacturing. The F&D sector is more labor-intensive than manufacturing as a whole but the apparent productivity of the work done varies widely by country. The disparity has increased further with the accession of the new member states. Value added is no more than EUR 15,000 per person employed in Estonia, Lithuania, Hungary and Slovakia but over EUR 50,000 in Belgium, Denmark, Finland and the U.K. The apparent productivity reached EUR 39,700 per employee in the EU-25 in 2001.

Labor Productivity & Personnel Costs by Sector - EU-15, 2001		
	Apparent Labor Productivity (EUR 1,000 per person employed)	Average Personnel Costs (EUR 1,000 per employee)
Production, processing, preserving of meat, meat products	35.5	25.2
Processing and preserving of fish and fish products	33.7	22.1

Processing and preserving of fruit and vegetables	46.4	27.3
Manufacture of vegetable and animal oils & fats	65.6	39.7
Manufacture of dairy products	54.6	33.6
Manufacture of grain mill products, starches and starch products	60.1	39.0
Manufacture of prepared animal feeds	60.2	36.1
Manufacture of other food products	38.4	25.2
Manufacture of beverages	83.1	40.0

Source: Eurostat

SECTORS OF THE F&D INDUSTRY

The EU F&D industry traditionally has four major sectors: "various or other food products", beverages, meat processing and dairy products. The four major sectors represent together around 80% of the EU's F&D sector's total turnover. The evolution of turnover in these sectors over the past 15 years, mostly reflects changing consumer behavior.

With EUR 65 million in 2001, the "various foods" category is the largest contributor to the EU-25 value added. This category is a heterogeneous group of products that includes bakery, pastry, chocolate and sugar confectionery products, noodles and pasta, tea and coffee and all other non-defined or relatively new food processing activities. The manufacture of bread, fresh pastry goods and cakes was the largest activity in this category.

The meat processing sector generated a value added of EUR 31 billion. Preferences for different types of meat differ from member state to member state. In the past years, the EU's meat processing sector has been confronted with several animal and human health safety crises such as dioxin contaminated poultry, BSE, foot and mouth disease, Avian Flu. Despite these incidents, the meat processing sector has maintained and even improved its position within the F&D sector.

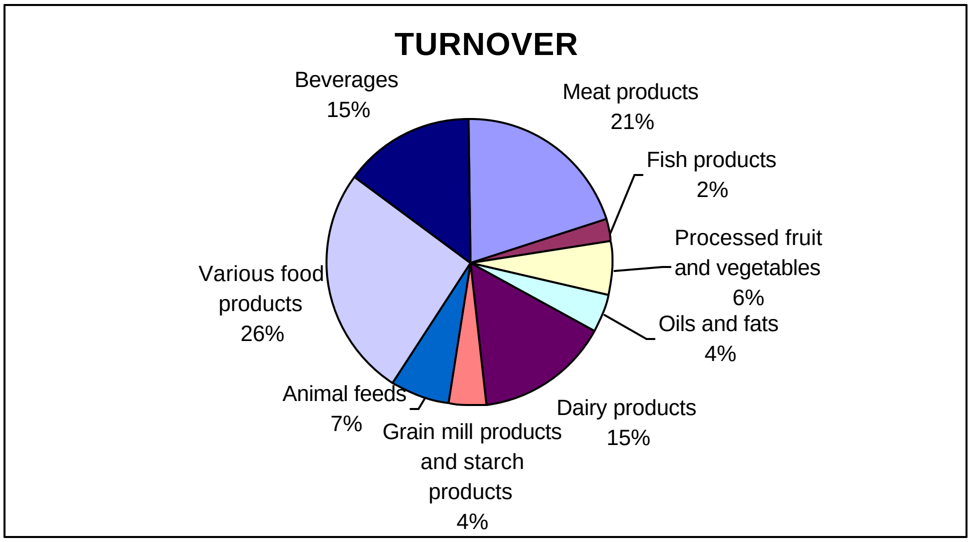
The dairy products sector generated a value added of EUR 18 billion. Most dairy products are destined for human consumption with the exception of powdered milk which is also used for cattle rearing. Facing a saturated final market, the dairy sector responded to changing consumers' demands by introducing low-fat products and fresh products in most product segments and uses health claims as a marketing tool for product differentiation. Milk production in the EU is governed by production quotas which imposes higher input prices on dairy manufacturers compared with free market conditions.

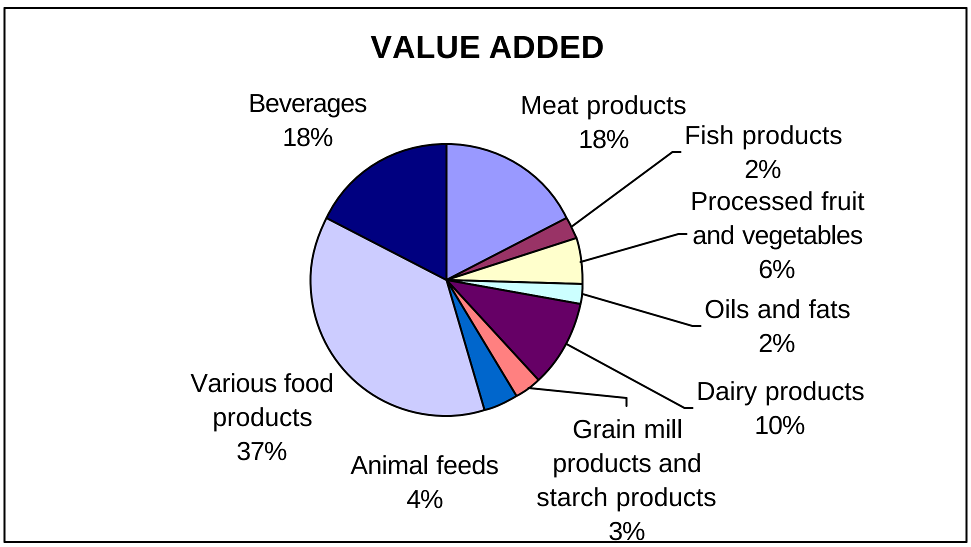
The EU-25 beverage sector generated a value added of EUR 31 billion in 2001. The beverage sector is marked by a strong differentiation of products and has, in contrast to many other food products, high advertising budgets. Multinational corporations dominate the beverage market. Typical for the EU beer market are the exclusive distribution contracts whereby brewers control a network of outlets to exclusively sell their beer brands. The largest product segment in volume terms was packaged water.

EU-25 PRODUCTION BY SECTOR - 2001						
Sector	**Turnover**		**Value Added**		**Number of Employees**	**Number of Companies**
	EUR billion	**%**	**EUR billion**	**%**	**1,000**	
Meat products	161	20.5	31	17.6	976	47,417
Fish products	19	2.4	4	2.3	134	3,799
Processed fruit &	46	5.9	10	5.7	257	8,194

vegetables						
Oils and fats	34	4.3	4	2.3	67	7,200
Dairy products	117	14.9	18	10.2	396	10,632
Flour & Starch products	31	3.9	6	3.4	118	6,997
Animal feed	52	6.6	7	4.0	131	5,115
Various food products	207	26.4	65	36.9	1,861	172,992
Beverages	118	15	31	17.6	446	19,462
Total	**785**	**100**	**176**	**100**	**4,386**	**281,808**

Source: Eurostat





TOP EU MANUFACTURERS

Top EU manufacturers ranked by 2003-2004 sales:

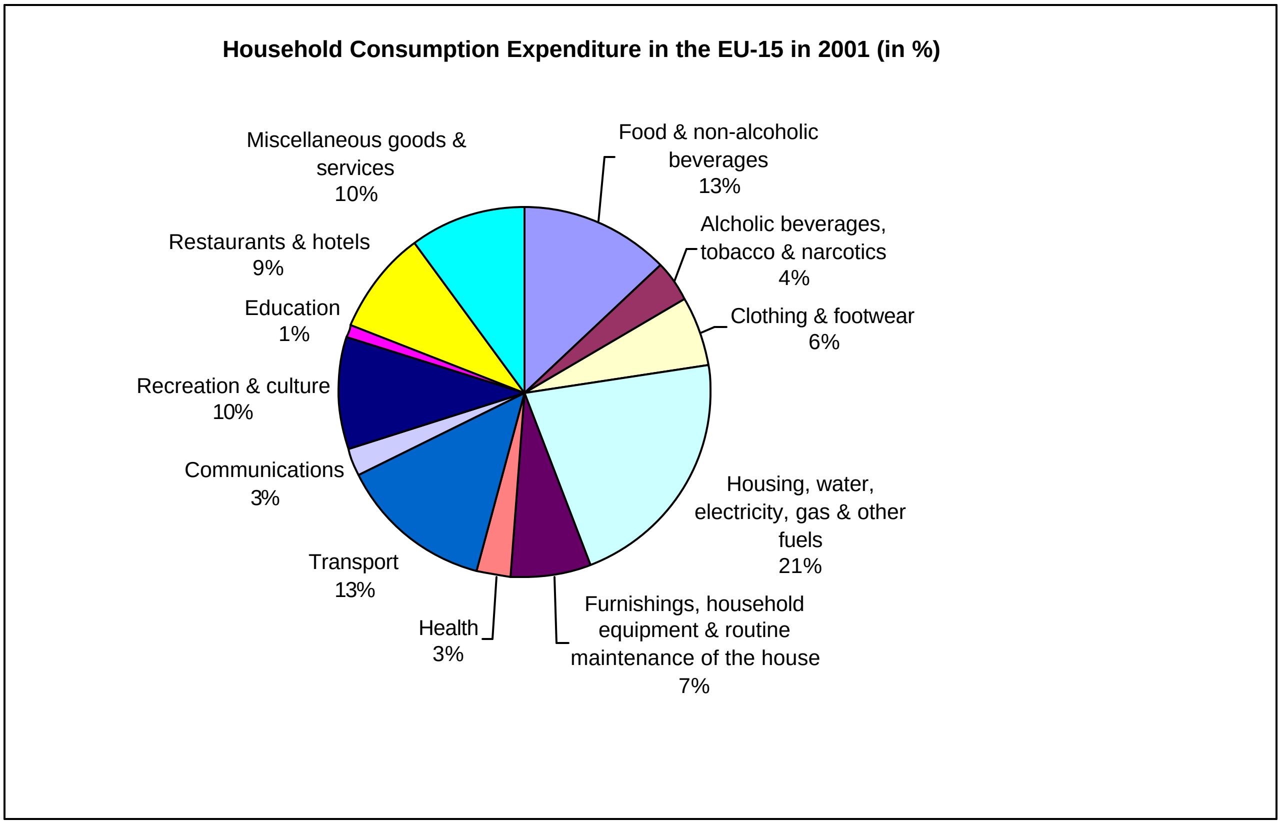
Manufacturer	Country	Food Sales EUR billion	Employees (1,000)	Sector
Unilever	Netherlands/UK	26.2	253	Dairy, beverages, dressings, frozen foods, cooking products
Diageo	UK	13.7	32	Alcoholic beverages
Danone	France	13.1	89	Dairy, beverages, biscuits and cereals
Cadbury Schweppes	UK	9.4	n/a	Beverages, confectionery
Heineken	Netherlands	9.3	61	Beer
Parmalat	Italy	7.6	n/a	Dairy, snacks, beverages
Scottish & Newcastle	UK	7.3	16	Alcoholic beverages
Associated British Foods	UK	7.1	35	Sugar, starches, prepared foods
InBev	Belgium	7.0	38	Beer
Oetker-Gruppe	Germany	4.8	19	Multi-product
Carlsberg	Denmark	4.7	31	Beer
Tate & Lyle	UK	4.6	7	Sweetener, starches
Sudzucker	Germany	4.6	18	Sugar, prepared foods
Ferrero	Italy	4.5	17	Confectionery
Bongrain	France	4.0	n/a	Dairy
Nutreco	Netherlands	3.7	13	Meat
Campina	Netherlands	3.7	7	Dairy
Pernod Ricard	France	3.5	12	Alcoholic beverages
Numico	Netherlands	3.2	11	Prepared foods
Wessanen	Netherlands	2.4	10	Prepared foods

Source: CIAA – figures refer to world sales

CONSUMPTION

EU-15

According to 2001 estimates, 13% of household budgets in the EU-15 was spent on food and non-alcoholic beverages. The share of the household budget spent on food fell between 1995 and 2001, mainly as a result of increasing available household income. The share varies with GDP per head: the lower GDP per head of a country, the higher the share of money spent on food.



Source: Eurostat

EU-25

Consumer habits vary significantly among the 25 EU member states. Factors such as culture, tradition, household composition, income and degree of urbanization can influence habits in each member state. The enlargement of the EU with 10 new member states has made these variations even more prominent than before. Consumer patterns across the enlarged EU reflect income differences but also the availability of goods and services. In the 1990’s, the share of the household budget spent on housing increased in the EU-15 while the share spent on food dropped proportionally. This is not the case in the new member states where food is still the largest expenditure, largely due to lower income levels.

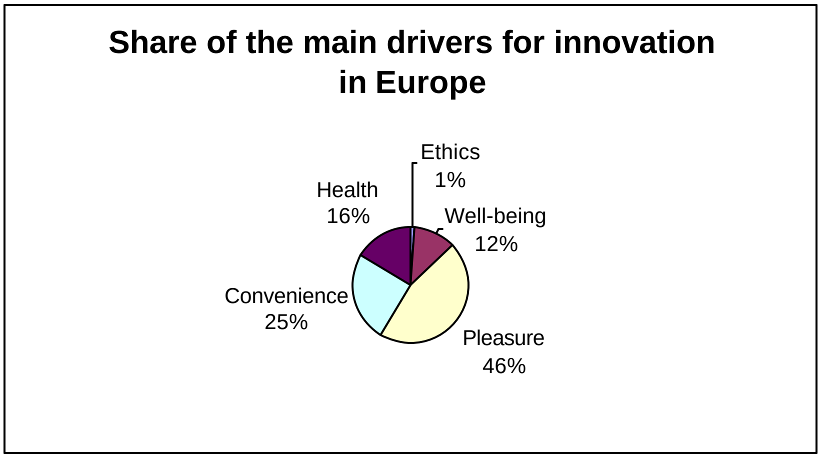
DETERMINANTS OF FOOD CHOICE

Food choice is not only based on individual preferences but are is also determined by social, cultural en economical circumstances. Population studies have indicated that there are clear differences in social classes with regard to food and nutrient intakes. Low-income groups have a greater tendency to consume unbalanced diets. As the price premium on healthy foods in also greater in low-income groups, there is a stronger reliance on energy-rich but nutrient-poor foods. This leads to both under-nutrition and to overweight and obesity.

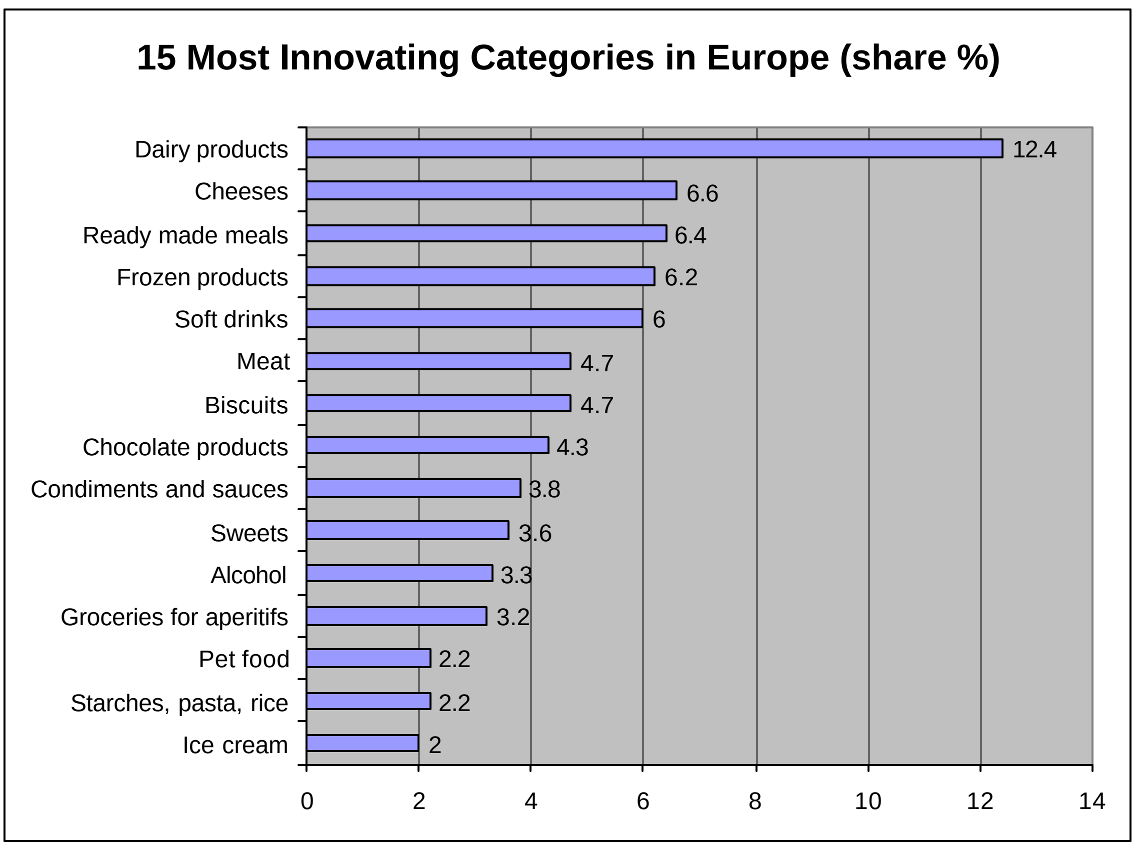
Obesity and diet-related illnesses are a growing problem in the EU. An increasing number of EU citizens, especially children and adolescents are overweight. The European Commission is in the process of reviewing how various EU policies could contribute to the fight against obesity and launched a European Platform for Action on Diet, Physical Activity and Health. The Platform brings together key EU-level representatives of the food, retail, catering and advertising industries, consumer organizations and health NGO's. The creation of the

Platform is part of the Commission's overall strategy on nutrition to address the obesity epidemic in Europe. Members of the Platform will put forward action plans detailing the activities they will undertake to promote healthier diets.

Nutrition and health have become major driving forces for research and the development of new products within the EU F&D industry. New ranges of low-calorie products and products with lower levels of fats, sugars and salt are being developed to cater to diet-conscious consumers. Other major drivers for food innovation are pleasure, ethics, well-being and convenience.



Source: CIAA



Source: CIAA

TRADE

In 2003, the value of total EU exports of food and drink products amounted to EUR 44.5 billion, a slight decrease compared to 2002 (-4%). With total EU imports amounting to EUR 38.7 billion in 2003, there was a positive trade balance of EUR 5.8 billion. European enterprises receive export refunds for transformed agricultural products (the so-called Non-Annex I products) to increase their competitiveness on world markets.

The U.S. is still the main export destination for European food and drink products, accounting for 21% of total EU exports. Other important markets are Japan, Russia and Switzerland. Brazil, Argentina and the U.S. are the main suppliers of food and drink products to the EU. Imports from Brazil and Argentina are mainly soybean oilcakes used in animal feed.

The two most important categories in terms of exports are beverages and various food products which covers chocolate, biscuits, confectionery and food preparations. Together they represent more than half of total EU exports of food and drink products. In contrast with the good performance of the various foods category (+3.4%), the exports of the meat sector, in particular poultry meat (-20%) suffered on competitive world markets. In terms of imports, the EU's fish sector represents a quarter of total EU imports of food and drink products.

EU-15 EXPORTS – BY SECTOR (Million Euros)			
Sector	**2003**	**2002**	**% Change**
Meat sector	3 904	4 451	-12.3
Processed and preserved fish and fish products	1 901	1 974	-3.7
Processed and preserved fruit and vegetables	2 604	2 797	-6.9
Animal and vegetable oils and fats	2 781	2 992	-7.1
Dairy products and ice cream	4 768	4 767	0
Grain mill products, starches and starch products	1 757	1 868	-6
Prepared animal feed *	1 135	1 353	-16.1
Chocolate, biscuits, confectionery & food preparations	11 178	11 388	-1.8
Beverages	13 989	14 080	-0.6
Other	527	652	
Total	**44 544**	**46 322**	**-3.8**

* This category includes prepared feed for farm animals and prepared petfood and excludes bulk commodities such as oilseed cakes and fish meal
Source: Eurostat

EU-15 TOP EXPORT DESTINATIONS - 2003		EU-15 TOP IMPORT ORIGINS - 2003	
Country	**Million Euros**	**Country**	**Million Euros**
U.S.	9 178	Brazil	3 935
Japan	3 351	Argentina	3 311
Switzerland	2 813	U.S.	2 799
Russia	2 456	Poland	1 582
Canada	1 396	New Zealand	1 433
Norway	1 211	China	1 325
Poland	1 165	Switzerland	1 299
Czech Republic	919	Thailand	1 168
Australia	836	Norway	1 167
South Korea	711	Turkey	1 066

Others	19 968	Others	19 643
Total	**44 544**	**Total**	**38 728**

Source: Eurostat

Annual increase (%) of EU exports of food and drink products						
1997	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**
11.4%	-3.1%	-3.9%	12.5%	5.0%	2.9%	-3.8%

Source: Eurostat

EU/US TRADE IN PROCESSED AGRICULTURAL PRODUCTS

The U.S. remains the EU's main export destination for processed agricultural products. EU exports to the U.S. in 2003 amounted to EUR 9.2 billion while imports from the U.S. amounted to EUR 2.8 billion, a positive trade balance of EUR 6.4 billion. EU exports to the U.S. increased by 46% from 1998 to 2003 while total EU exports of food and drink products registered a growth of only 12% over the same period.

Beverages represent more than half of the EU's processed agricultural products to the U.S. Other main products exported to the U.S. are: dairy (EUR 536 million), oils and fats (EUR 498 million), preparations of cereals, flour, starch and milk (EUR 494 million) and cocoa preparations (EUR 424 million).

Main EU imports of processed agricultural products from the U.S. are: animal feed (EUR 680 million), beverages (EUR 676 million), processed vegetables and fruit – incl. processed nuts - (EUR 244 million) and oils and fats (EUR 110 million). Beverages cover both alcoholic and non-alcoholic beverages: mineral waters, soft drinks, beer, wine and spirits. Fruit juices are listed as a separate category.

EU/US TRADE, BY SECTOR - 2002 and 2003 (million Euros)				
	2002		**2003**	
Product	**Import**	**Export**	**Import**	**Export**
Processed meat	36	263	38	279
Fish products	114	38	73	37
Processed vegetables	150	462	135	418
Processed fruit	111	94	109	85
Juices	114	78	89	51
Products of the milling industry	20	78	13	91
Dairy	21	545	26	536
Beverages	669	5 903	676	5 873
Preparations of cereals, flour, starch & milk	55	555	47	494
Cocoa preparations	16	415	17	424
Oils & Fats	150	515	110	498
Sugar & confectionery	65	208	58	183
Animal feed [1]	842	98	680	86
Coffee, tea & spices	27	246	25	255

Other food products 2	317	243	275	281

Source: Global Trade Atlas
1 HS code 23 – includes oil cakes and fish meal
2 includes yeasts, sauces, soups, ice cream and protein concentrates

The top-3 importing member states of U.S. food and drink products in 2003 are: U.K. (EUR 822 million), Netherlands (EUR 475 million) and Germany (EUR 238 million). Main U.S. products exported to the U.K. include: beverages (EUR 292 million), animal feed (EUR 186 million) and other food products (EUR 119 million). Main U.S. exports to the Netherlands include: animal feed (EUR 231 million), other food products (EUR 106 million) and beverages (EUR 94 million). Main U.S. exports to Germany include: beverages (EUR 101 million), animal feed (EUR 82 million) and processed fruit and vegetables (EUR 44 million).

The top-3 exporting member states are: France (EUR 2,128 million), Italy (EUR 1.796 million) and Netherlands (EUR 1.388 million).

PROCESSED AGRICULTURAL PRODUCTS: EU/US TRADE, BY MEMBER STATE – 2002 & 2003 (million Euros)

MEMBER STATE	2002		2003	
	IMPORT	EXPORT	IMPORT	EXPORT
AUSTRIA	15	136	14	197
BELGIUM	126	198	103	212
DENMARK	70	361	53	367
FINLAND	14	51	15	43
FRANCE	143	2 155	138	2 128
GERMANY	282	751	238	761
GREECE	33	110	24	103
IRELAND	150	213	122	265
ITALY	125	1 846	109	1 796
NETHERLANDS	605	1 478	475	1 388
PORTUGAL	77	80	63	61
SPAIN	179	677	146	646
SWEDEN	60	454	50	442
U.K.	829	1 233	822	1 182

Source: Global Trade Atlas

INFO FOR U.S. EXPORTERS

Import regulations are harmonized throughout the EU. Detailed information on EU import requirements, food standards, customs duties, etc. is available on U.S. Mission to the EU's website at http://www.useu.be/agri/usda.html and in the "Food & Agricultural Import Regulations & Standards (FAIRS)" reports on http://www.useu.be/agri/fairs.html. Exporters can also subscribe to a bi-weekly e-newsletter that provides information on changes to EU rules.

New-to-market as well as experienced exporters may wish to check FAS' U.S. Exporter Assistance site at http://www.fas.usda.gov/agx/exporter_assistance.asp for information on trade shows, export programs, buyer lists, etc.

Although the EU has become a more homogeneous food and drink market, significant differences still exist in national consumption trends. A thorough analysis of the best prospects for U.S. products is provided in the "Exporter Guides" and "Food Processing Ingredients Sector" reports prepared by the Offices of Agricultural Affairs in the individual member states. To download these reports go to FAS' Attache Reports site at http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp and select a category.

GLOSSARY

- BSE: Bovine Spongiform Encephalopaties
- CAP: Common Agricultural Policy
- EU-15: European Union consisting of 15 member states (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, United Kingdom)
- EU-25: EU-15 + 10 new member states (Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, Slovenia)
- EUR: Euro (European currency)
- FAS: Foreign Agricultural Service
- F&D: Food & Drink
- GDP: Gross Domestic Product (Final result of the production activity of resident producer units. Corresponds to the economy's total output of goods and services, less intermediate consumption.)
- NGO: Non-Governmental Organization
- SME: Small and Medium-Sized Enterprises
- U.K.: United Kingdom
- U.S.: United States
- USD: United States Dollar
- VAT: Value Added Tax

- Apparent Labor Productivity: value added at factor cost divided by the number of persons employed (expressed in EUR 1,000 per person employed).
- Intermediate consumption: value of good and services consumed as inputs in the production process.
- Non-Annex I products: high added value products (such as chocolate, cookies, ice cream and spirits) not included in Annex I to the Treaty of Amsterdam eligible to receive EU export refunds.
- Value added: value added measured at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes.
- Turnover: corresponds to market sales of good and services supplied to third parties. It includes all duties and taxes (except VAT) and other charges (transport, packaging, etc.) passed on to the customer.

Sector Definitions:
- Meat: covers all meat processing stages that follow on from animal rearing. Also includes the treatment of hides and skins, the rendering of fats and the processing of animal offal.
- Fish: covers the preparation and preservation of fish, crustaceans and mollusks. Manufacture of fish soups and oils and fats derived from aquatic species is not included.
- Dairy: covers the production of fresh milk, cream, butter, yogurt, cheese, whey, ice creams and sorbets.

- Other food products: covers the production of bread, sugar, confectionery, pasta, tea, coffee, homogenized and dietetic foods.
- Beverages: covers both alcoholic and non-alcoholic beverages.

Exchange rates:
- 2004: 1 Euro = 1.2433 USD
- 2003: 1 Euro = 1.1309 USD
- 2002: 1 Euro = 0.9449 USD

SOURCES

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- The Social Situation in the European Union 2004
- Green Paper "Confronting demographic change: a new solidarity between the generations"

European Food Information Council:
- Food Today Newsletter

Global Trade Atlas (trade statistics)

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E35060	Allergen Labeling – Temporary Exemptions	3/23/2005
E35025	Pre-Packed Products: Simplified Legislation	2/8/2005
E34103	Food Contact Materials – Active & Intelligent Packaging	12/13/2004
E34093	Allergen Labeling on Wine	11/29/2004
E34054	FAIRS	8/31/2004
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